Markeltree

AI and software company

AI PLANNING RESOURCE

AI Readiness Checklist for Businesses

A direct, practical assessment of whether your business has the workflow, data, systems, controls, ownership, and success metrics needed to begin an AI initiative.

Use case | Data | Systems | Governance | ROI

DIRECT ANSWER

How do you know whether a business is ready for AI?

A business is ready to begin an AI project when it can name a specific workflow, identify the users and owner, access reliable data or approved knowledge, connect the required systems, define acceptable outputs and exceptions, provide human review where needed, and measure the business result.

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The Five AI Readiness Dimensions

01

Business Readiness

- ✓ A specific workflow or decision is identified
- ✓ An accountable business owner is named
- ✓ The current cost, delay, or friction is understood
- ✓ The expected value can be measured

02

Data Readiness

- ✓ Required data or knowledge is available
- ✓ Sources are accurate and authoritative
- ✓ Permissions and ownership are clear
- ✓ Quality and gaps are understood

03

Technology Readiness

- ✓ Required systems and APIs are identified
- ✓ Access and documentation are available
- ✓ Hosting and integration constraints are known
- ✓ Monitoring can be implemented

04

Governance Readiness

- ✓ Acceptable and prohibited outputs are defined
- ✓ Human review and escalation are designed
- ✓ Security and privacy requirements are known
- ✓ Audit and retention needs are identified

05

Adoption Readiness

- ✓ Users understand how the workflow will change
- ✓ Training and support owners are named
- ✓ Feedback can be collected
- ✓ Rollout can begin with a controlled pilot

Direct answer

AI readiness does not require perfect data or a complete enterprise plan. It requires a bounded use case, accessible inputs, clear ownership, safe operating rules, and a way to measure whether the pilot works.

AI Use-Case Scoring Worksheet

Question	Low readiness	Higher readiness
Is the business problem specific?	“We need AI.”	“We need to reduce lead response time from hours to minutes.”
Is the workflow frequent?	Rare, inconsistent task	Repeated, high-volume process
Are inputs available?	Unknown or inaccessible	Permissioned, documented, usable sources
Can outputs be evaluated?	No clear standard	Known rules, examples, acceptance criteria
Are exceptions understood?	Unbounded and high-risk	Escalation and human review are defined
Can systems connect?	No access or integration path	APIs, data export, or controlled workflow exists
Can value be measured?	General innovation goal	Time, cost, conversion, accuracy, or service metric

Recommended first project

Select a use case with high business value, moderate technical complexity, available data, clear evaluation, and manageable risk. Avoid beginning with the most sensitive or operationally critical workflow.

Before You Build an AI Pilot

Define the pilot

- ✓ One primary workflow
- ✓ Named user group
- ✓ Approved data sources
- ✓ Limited system access
- ✓ Clear expected outputs
- ✓ Known exceptions
- ✓ Human review rules
- ✓ Measurable success criteria

Define production readiness

- ✓ Functional and edge-case testing
- ✓ Security and privacy review
- ✓ Monitoring and logs
- ✓ Fallback and escalation
- ✓ User training
- ✓ Operational ownership
- ✓ Release and rollback plan
- ✓ Continuous improvement process

Strong early use cases

Knowledge assistants, lead qualification, document extraction, internal search, scheduling, status answers, reporting summaries, workflow routing, and recommendation support.

Use extra caution

High-impact financial, legal, medical, employment, safety, identity, or irreversible decisions require stronger governance, subject-matter oversight, testing, and human authority.

Direct answer: A pilot proves whether the workflow, data, user experience, controls, and business value work together in the real operating environment.

Your AI Readiness Result

Suggested next step by readiness level

Readiness	Recommended action
Early	Run workflow discovery, select a use case, and identify data and system owners.
Developing	Prepare data, define evaluation, map integrations, and design governance.
Pilot-ready	Build a bounded MVP with limited users, measurable outcomes, and human review.
Scale-ready	Strengthen monitoring, security, operations, adoption, integrations, and capacity.

Direct answer: Markeltree can help assess readiness, define the AI product strategy, build the pilot, integrate it with business systems, and support controlled expansion.

Prepared from Markeltree public website content and official company information, reviewed July 2026. Sources: https://markeltree.com/ai-development/; https://markeltree.com/services/; https://markeltree.com/contact/. Project scope, compliance requirements, technologies, and timelines are confirmed during discovery.

Talk with Markeltree

Discuss your business challenge, product idea, current system, or AI opportunity with the Markeltree team.

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